

A Cradle to Grave Look at Managing Externally Funded Projects

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Overview

- The Proposal Phase
- Post Award Management
- Banner Screens



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The Proposal Phase



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The Proposal Phase

- OP 70.01 Sponsored Projects
 - “The policy of Mississippi State University is that all proposal and awards for funding from external sponsors shall be processed through the Office of Sponsored Projects (OSP) unit of the Office of Research and Economic Development. This includes funding from external sponsors for all research, service, and instructional activities.”



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The Proposal Phase

- Pre-proposals (preliminary proposals, white papers, etc.) must be routed through OSP when:
 - A detailed budget is required
 - MSU is committing cost share or matching
 - The sponsor requires the Authorized Organizational Representative's (AOR) signature
 - The sponsor requires submission through a portal which only OSP can submit
 - Institutional certifications or assurances are required



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The Proposal Phase

- Internal Approval Sheet (IAS)
 - Project Type
 - Research (on- or off-campus)
 - Instruction (on- or off-campus)
 - Other (on- or off-campus)
 - IPA (off-campus)



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Pre-Award Questions

Office of Sponsored Projects

Kevin Enroth, Director

www.osp.msstate.edu

662-325-7404



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Post Award Management



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FOAPAL

- Fund => Funding Source
- Organization => Administrative Department
- Account => Type of Transaction (expense or revenue)
- Program => Type of Work (instruction, research, service)
- Activity => Used for Specific Purpose
- Location => Payroll Position #



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Fund Types (FTMFUND)

- 1xxxxx State Funding (E&G & separately approp.)
- 2xxxxx Auxiliary & Designated
- 3xxxxx Restricted Funds
- 5xxxxx Endowment Funds
- 6xxxxx Plant Funds
- 8xxxxx Cost Share Funds
- 9xxxxx MSCL Separate Appropriation



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Org Codes (FTMORGN)

01xxxx	College of Agriculture & Life Sciences
02xxxx	College of Architecture
03xxxx	College of Arts & Sciences
04xxxx	College of Business
05xxxx	College of Education
06xxxx	College of Engineering
08xxxx	College of Wildlife & Fisheries
09xxxx	Graduate School
18xxxx	College of Veterinary Medicine
19xxxx	University Level Centers & Institutes



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Account Codes (FTMACCT)

- 35xxxx Revenue
- 40xxxx Expense
 - 401000 Salary and Wages
 - 403xxx Fringe Benefits
 - 404xxx Travel
 - 405xxx Contractual Services
 - 406xxx Commodities
 - 408xxx Equipment
 - 409xxx Transfers Between Funds



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Transfer Account Codes

Using Transfer Codes Correctly

- Between fund types (10=>30, 20=>30, etc.)
 - Non-Cost Share – Expense 409202, Revenue 359202
 - Cost Share - Expense 409101, Revenue 359101
- Within fund types (20=>20, 30=>30, etc.)
 - Non-Cost Share - Expense 409301, Revenue 359301
 - Cost Share – Expense 409302, Revenue 359302



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Program Codes (FTMPROG)

- ✓ 01xxxx General Academic/Instruction
 - 011000 – General Academic
 - 011024 – General Acad Non-Sponsored Research
 - 011038 – General Academic Service
- ✓ 02xxxx Research
 - 021000 – Institutes & Research Centers
 - 022000 – Individual on Project Research
 - 023000 – Research Initiatives
 - 027000 – Agricultural Research
- ✓ 03xxxx Public Service/Instruction
 - 031000 – Institutional Public Service
 - 032000 – Family and Consumer Sciences
 - 032024 – Family and Consumer Sciences Ext Research
 - 033xxx, 034xxx, 035000, 036000, 037xxx, 038xxx

And more....



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Post Award Management

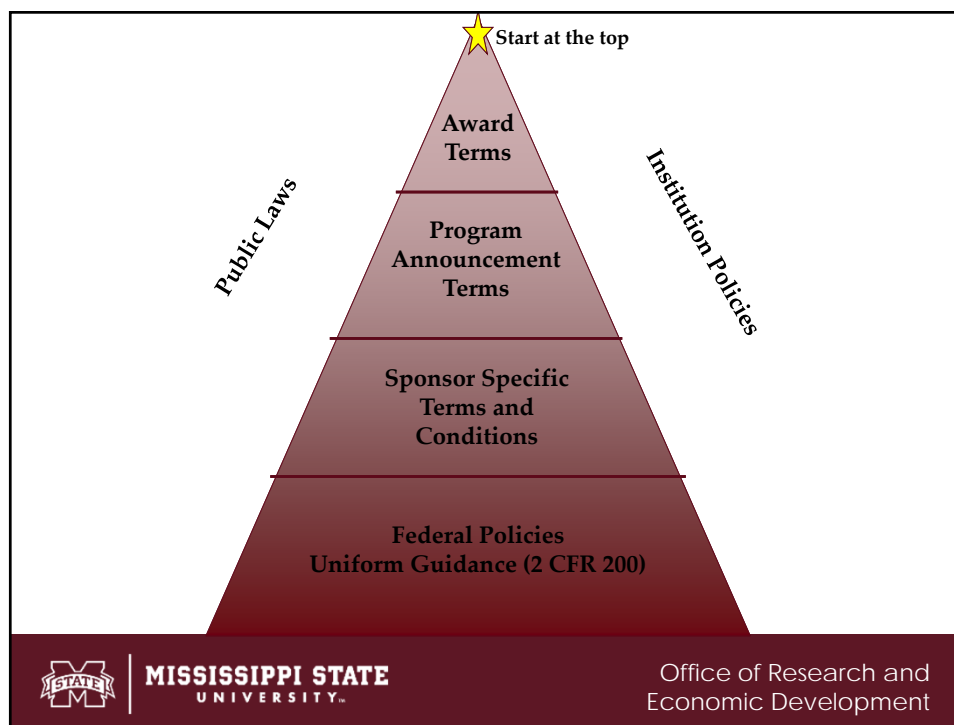
- Terms and Conditions (T&Cs)
 - Know the T&Cs specific to the award
 - Know the T&Cs specific to the funding agency
 - Familiarize yourself with Uniform Guidance (UG) - 2 CFR Part 200
 - Know university policy and state law
- www.policies.msstate.edu



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Uniform Guidance

Revisions Taking Place

- Initial changes went into effect August 13, 2020
 - Including 2019 National Defense Authorization Act (NDAA) Section 889

Section 889 of the 2019 National Defense Authorization Act (NDAA) prohibits the federal government, government contractors, and grant and loan recipients from procuring or *using* certain “covered telecommunication equipment or services” that are produced by Huawei, ZTE, Hytera, Hikvision, and Dahua and their subsidiaries as a “substantial or essential component of any system, or as critical technology as part of any system.”
- Other changes go into effect November 12, 2020

<https://www.performance.gov/CAP/grants/> (Look under “Innovation Exchange Sessions”)



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Post Award Management

- Reconcile on a monthly basis (OP 61.01)
- Subaward Monitoring
- Time & Effort Certification
- Cost Share (OP 80.13)
- Cost Transfers (OP 61.06)



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Post-Award Questions

Sponsored Programs Accounting

Denise Peeples, Director

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Banner Screens

FRAGRNT – Provides detailed info on externally funded projects

FGIBAVL – Shows balance available in each budget category for restricted funds and overall on E&G funds (enter 400000 in account field)

FGIBDST – For 10 funds, shows balance available in a known location (Pos#); Can be used for restricted funds too

FOIDoch – Shows details of a purchase/payment (direct pays and Reqs/POs/Invoices)

FGIDOCR – Shows details of JVs (PC, TR, IC, etc.)

FGITRND – Provides details on transaction activity



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Miscellaneous

Paperwork requiring ORED approval can be submitted to:

oredmail@research.msstate.edu



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ORED Business Office Staff



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Banner Forms and Reports for Managing Restricted Funds

<u>Report</u>	<u>Description</u>
FWREXDP	Used to run DETAIL ledgers ctrl page down; enter printer number; ctrl page down; FY code (07), start/end periods arrow down to fund and enter then, ctrl page down, Save
FWGDEXP	Used to run ledgers with NO DETAIL Same as FWREXDP except you must enter starting and ending fund numbers
FWREXCS	Cost Share Fund Report - list detail information including dates, budget and fund balance ctrl page down; enter printer number; ctrl page down; enter start and ending org code ctrl page down, F10
NWRSALD	Grant Salary Report - list employees paid on a fund, current and cumulative figures for salary and fringe ctrl page down; enter printer number; ctrl page down, enter fund, calendar year and month (which is calendar month for example August is 08)
<u>Form</u>	<u>Description</u>
FGITRND	Detail Transaction Activity; Used to find account codes & charges posted to the accounts; enter fund; delete Org, Prog, Acct; enter period; ctrl page down; F8; press roll back button to start new query; if no documents after F8 Ctrl Q and roll back
FOIDOCH	Document history & information - INVOICES, Requisitions, and Purchase Orders
FGIDOCR	Document history & information - JV'S
FGITBAL	This screen allows you to check the fund balance. Move the cursor to the Fund field, enter your fund number, and control page down.
NHIDIST	This form allows you to query Salary/FB information on a fund or individual. Enter the time period that you are looking for, and the fund number, control page down, you can either use F8 to query everyone on the fund, or enter the MSU ID and query a specific person.
FGIBDST	Allows you to check the budget status on a fund by category. Budget amount, ytd exp, balance available.
FGIBAVL	Allows you to check the available balance of a budget. You must enter an account number on this screen.
FRAGRNT	Allows you to see the beginning and ending date of a fund. Also shows the amount of money awarded, and if there is any text entered for the fund.
FRIGRNT	Allows you to query grant information. Partial contract number, amount, dates, etc. You can also query by Principle Investigator ID number and/or organization number

HELPFUL FORMS IN BANNER

FGIBAVL – Budget Availability Status

Displays Available Balance used for NSF checking. This form includes pending documents that have been keyed but not yet posted.

FGIBDST – Organization Budget Status

Displays activity for each account number. This form can be used to look at the available balance by position number. You just need to enter your fund, org, and position number and page down. The position number should be entered in the Location Field as P, zero, and the last 4 digits of your position number, for example. P01234.

FZIBDST – Available Balance by Major Object

Displays the available balance by each major account code.

NBIPINC – Position Incumbent List

Displays all employees in a particular position number. The query date should **ALWAYS** be the last day of the current Fiscal Year. For example, June 30, 2009.

NBIPORG – Position List by Organization

Displays all of the position numbers for a particular org. The query date should **ALWAYS** be the last day of the current Fiscal Year. For example, June 30, 2009.

NHIDIST – Labor Distribution Data Inquiry

Displays salary and fringe information by individual employee. This form works much faster if you enter the employee's MSU ID before executing the query.